EXHBIT: _____8_____ _11 pages_

OFFICE OF PERSONNEL MANAGEMENT

JOB DESCRIPTION: PROJECT MANAGEMENT: 2210

My True Government Job description

Interpretive Guidance for Project Manager Positions   CG03-0001 August 2003

Project Manager Characteristics

Project Manager Duties/Tasks

Project manager positions exist in many different disciplines. For example, an engineer or architect normally manages projects associated with designing specialized equipment or structures. Subject matter experts in fields such as IT or finance deal with developing and testing information networks and financial systems. However, regardless of the subject matter area involved, the project manager function is characterized by a *common set* of duties/tasks. A project manager generally applies all of these duties/tasks to meet project requirements, as follows:

- Determines appropriate products or services with clients or customers to define project scope, requirements, and deliverables;
- Develops, modifies, or provides input to project plans;
- Implements project plans to meet objectives;
- Coordinates and integrates project activities;
- Manages, leads, or administers project resources;
- Monitors project activities and resources to mitigate risk;
- Implements or maintains quality assurance processes;
- Makes improvements, solves problems, or takes corrective action when problems arise;
- Gives presentations or briefings on all aspects of the project;
- Participates in phase, milestone, and final project reviews;
- Identifies project documentation requirements or procedures; and
- Develops and implements product release plan.

IT Project Manager Duties/Tasks

In addition to the duties/tasks cited above that are common to most project manager positions, IT project managers perform or are responsible for managing most of the following:

- Identifies customers' information systems requirements;
- Analyzes information systems requirements or environment;
- Designs or conducts analytical studies, cost-benefit analyses, or other research;
- Evaluates, monitors, or ensures compliance with laws, regulations, policies, standards, or procedures;
- Purchases or contracts for IT services, equipment, products, supplies, property, or other items;
- Integrates information systems subsystems;
- Develops information systems testing strategies, plans, or scenarios;
- Identifies standards or requirements for infrastructure configuration or change management;
- Participates in change control (for example, reviewing configuration change requests);
- Develops or implements information systems security plans and procedures; and
- Ensures appropriate product-related training and documentation are developed and made available to customers.

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Project Manager Knowledge, Skills, and Abilities/Competencies

All project managers apply common knowledge, skills, and abilities/competencies, organized into three areas:

- General knowledge, skills, and abilities/competencies;
- Project management knowledge, skills, and abilities/competencies; and
- Technical knowledge, skills, and abilities/competencies.

The specific knowledges, skills, and abilities/competencies for each functional area are as follows:

General Knowledge, Skills, and Abilities/Competencies

- **Customer Service** - Works with clients and customers (that is, any individuals who use or receive the services or products that your work unit produces, including the general public, individuals who work in the agency, other agencies, or organizations outside the Government) to assess their needs, provide information or assistance, resolve their problems, or satisfy their expectations; knows about available products and services; is committed to providing quality products and services.

- **Decision Making** - Makes sound, well-informed, and objective decisions; perceives the impact and implications of decisions; commits to action, even in uncertain situations, to accomplish organizational goals; causes change.

- **Flexibility** - Is open to change and new information; adapts behavior or work methods in response to new information, changing conditions, or unexpected obstacles; effectively deals with ambiguity.

- **Interpersonal Skills** - Shows understanding, friendliness, courtesy, tact, empathy, concern, and politeness to others; develops and maintains effective relationships with others; may include effectively dealing with individuals who are difficult, hostile, or distressed; relates well to people from varied backgrounds and different situations; is sensitive to cultural diversity, race, gender, disabilities, and other individual differences.

- **Leadership** - Influences, motivates, and challenges others; adapts leadership styles to a variety of situations.

- **Legal, Government and Jurisprudence** - Knowledge of laws, legal codes, court procedures, precedents, legal practices and documents, Government regulations, Executive orders, agency rules, Government organization and functions, and the democratic political process.

- **Oral Communication** - Expresses information (for example, ideas or facts) to individuals or groups effectively, taking into account the audience and nature of the information (for example, technical, sensitive, controversial); makes clear and convincing oral presentations; listens to others, attends to nonverbal cues, and responds appropriately.

- **Organizational Awareness** - Knows the organization's mission and functions, and how its social, political, and technological systems work and operates effectively within them; this includes the programs, policies, procedures, rules, and regulations of the organization.

- **Problem Solving** - Identifies problems; determines accuracy and relevance of information; uses sound judgment to generate and evaluate alternatives, and to make recommendations.

- **Reasoning** - Identifies rules, principles, or relationships that explain facts, data, or other information; analyzes information and makes correct inferences or draws accurate conclusions.

- **Team Building** - Inspires, motivates, and guides others toward goal accomplishments. Consistently develops and sustains cooperative working relationships. Encourages and facilitates cooperation within the organization and with customer groups; fosters commitment, team spirit, pride, trust. Develops leadership in others through coaching, mentoring, rewarding and guiding employees.

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- **Writing** - Recognizes or uses correct English grammar, punctuation, and spelling; communicates information (for example, facts, ideas, or messages) in a succinct and organized manner; produces written information, which may include technical material, that is appropriate for the intended audience.

Project Management Knowledge, Skills, and Abilities/Competencies

- **Business Process Reengineering** - Knowledge of methods, metrics, tools, and techniques of Business Process Reengineering.

- **Capital Planning and Investment Assessment** - Knowledge of the principles and methods of capital investment analysis or business case analysis, including return on investment analysis.

- **Contracting/Procurement** - Knowledge of various types of contracts, techniques for contracting or procurement, and contract negotiation and administration.

- **Cost-Benefit Analysis** - Knowledge of the principles and methods of cost-benefit analysis, including the time value of money, present value concepts, and quantifying tangible and intangible benefits.

- **Financial Management** - Prepares, justifies, and/or administers the budget for program areas; plans, administers, and monitors expenditures to ensure cost-effective support of programs and policies; assesses financial condition of an organization.

- **Planning and Evaluating** - Organizes work, sets priorities, and determines resource requirements; determines short- or long-term goals and strategies to achieve them; coordinates with other organizations or parts of the organization to accomplish goals; monitors progress and evaluates outcomes.

- **Project Management** - Knowledge of the principles, methods, or tools for developing, scheduling, coordinating, and managing projects and resources, including monitoring and inspecting costs, work, and contractor performance.

- **Quality Assurance** - Knowledge of the principles, methods, and tools of quality assurance and quality control used to ensure a product fulfills functional requirements and standards.

- **Requirements Analysis** - Knowledge of the principles and methods to identify, analyze, specify, design, and manage functional and infrastructure requirements; includes translating functional requirements into technical requirements used for logical design or presenting alternative technologies or approaches.

- **Risk Management** - Knowledge of methods and tools used for risk assessment and mitigation of risk.

Technical Knowledge, Skills, and Abilities/Competencies:

- **Technical Competence** - Uses knowledge that is acquired through formal training or extensive on-the-job experience to perform one's job; works with, understands, and evaluates technical information related to the job; advises others on technical issues.

Note: Additional technical competencies should be identified based on the specific occupation -- see the IT project manager example below.

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IT Project Manager Knowledge, Skills, and Abilities/Competencies

In addition to the knowledge, skills, and abilities/competencies required of all project managers, IT project managers also require specific knowledge, skills, and abilities/competencies in applying most of these:

- **Configuration Management** - Knowledge of the principles and methods for planning or managing the implementation, update, or integration of information systems components.

- **Data Management** - Knowledge of the principles, procedures, and tools of data management, such as modeling techniques, data backup, data recovery, data dictionaries, data warehousing, data mining, data disposal, and data standardization processes.

- **Information Management** - Identifies a need for and knows where or how to gather information; organizes and maintains information or information management systems.

- **Information Resources Strategy and Planning** - Knowledge of the principles, methods, and techniques of information technology (IT) assessment, planning, management, monitoring, and evaluation, such as IT baseline assessment, interagency functional analysis, contingency planning, and disaster recovery.

- **Information Systems/Network Security** - Knowledge of methods, tools, and procedures, including development of information security plans, to prevent information systems vulnerabilities, and provide or restore security of information systems and network services.

- **Information Technology Architecture** - Knowledge of architectural methodologies used in the design and development of information systems, including the physical structure of a system's internal operations and interactions with other systems.

- **Information Technology Performance Assessment** - Knowledge of the principles, methods, and tools (for example, surveys, system performance measures) to assess the effectiveness and practicality of information technology systems.

- **Infrastructure Design** - Knowledge of the architecture and typology of software, hardware, and networks, including LANS, WANS, and telecommunications systems, their components and associated protocols and standards, and how they operate and integrate with one another and with associated controlling software.

- **Systems Integration** - Knowledge of the principles, methods, and procedures for installing, integrating, and optimizing information systems components.

- **Systems Life Cycle** - Knowledge of systems life cycle management concepts used to plan, develop, implement, operate, and maintain information systems.

- **Technology Awareness** - Knowledge of developments and new applications of information technology (hardware, software, telecommunications), emerging technologies and their applications to business processes, and applications and implementation of information systems to meet organizational requirements.

Classifying Project Manager Positions

When you classify a position, you must determine the following:

- The proper pay category;
- The proper occupational series;
- The official position title; and
- The proper grade or level of work.

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Determining the Pay Category

Project manager positions usually are General Schedule (GS) positions. However, some positions may be Senior Executive Service (SES) positions or Senior Level (SL) or Scientific/Professional (ST) positions. Guidance for identifying such positions above the GS-15 grade level can be found on pages 13-15. This guidance is not intended for Federal Wage System (FWS) positions.

Determining Occupational Series

The occupational series of a project manager position usually is apparent by reviewing the duties and responsibilities assigned to the position. In most instances, the primary work of the position, the highest level of work performed, and the paramount occupational knowledge for the project manager work dictate the appropriate series.

Users of the position classification standards normally have little trouble making the series decision by comparing the characteristics of the position in question to series definitions and occupational information in the standards. However, if the work of a project manager position falls into more than one series, the correct series is sometimes difficult to determine. If it is unclear whether a particular series predominates, consider the following to determine the correct series:

- *Paramount occupational knowledge required.* Although a project manager position may include several different kinds of work, most positions have a paramount occupational knowledge requirement in addition to the project management knowledge, skills, and abilities/competencies. The paramount occupational knowledge is the most important subject matter knowledge or subject-related experience required to do the work.

- *Reason for existence.* The primary purpose of the project manager position, or management's intent in establishing the project manager position, is a positive indicator in determining the appropriate series.

- *Organizational mission and/or function.* Project manager positions generally align with the mission and function of the organization to which they are assigned. The organization's function often is mirrored in the organizational title and may influence the choice of appropriate series.

- *Recruitment source.* Supervisors and managers can help by identifying the occupational series that provides the best qualified applicants to do the project manager work. This aspect correlates with the paramount knowledge required by the project manager position.

Determining IT Project Manager Occupational Series

The Information Technology Management Series, GS-2210, is the proper occupational series for IT project manager positions. This series only covers General Schedule positions up to GS-15.

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Determining Official Position Titles

Any position may have an organizational title or functional title, but every position must have an official title. 5 U.S.C. 5105 (a)(2) requires OPM to establish the official class titles. However, subsection 5 U.S.C. 5105(c) states that this requirement does not prevent the use of organizational or other titles for internal administration. In those instances where OPM has not prescribed an official title for a series, an agency may construct its own official title. According to the **Introduction to the Position Classification Standards**, constructed titles should be "short," "meaningful," and "generally descriptive of the work performed."

> **Note: IT Project Manager Official Position Title.** OPM Memorandum dated August 26, 2003, Subject: Official Position Title for IT Project Manager Positions amends the Job Family Standard for Administrative Work in the Information Technology Group, GS-2200, dated May 2001, and authorizes **IT Project Manager** as the official title for this function when it is characterized by the common set of duties/tasks described on page 4.

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Applying Grading Criteria to Project Manager Positions

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According to the **Introduction to the Position Classification Standards**, selecting the appropriate grade level criteria is critical for determining the proper classification of a position. If the work assigned to a project manager position is adequately covered by the grading criteria in a particular standard for a specific occupational series or job family, then evaluate the work by that occupational series or job family standard (JFS).

If the type of project manager work does not have a directly applicable occupational series, job family, or functional standard, then select a standard as similar as possible to the kind of work described. Evaluate and grade the project manager position in question by comparing it to grading criteria in the comparable standard, as it relates to:

- The kind of work processes, functions, or subject matter of the work performed;
- The qualifications required to do the work;
- The level of difficulty and responsibility necessary; and
- The combination of classification factors having the greatest influence on the grade level.

When making these determinations, we recommend referring to one of the following standards for making meaningful comparisons:

- The **JFS for Administrative Work in the Information Technology Group, GS-2200**, to evaluate project manager positions for IT projects;
- The **JFS for Professional and Administrative Work in the Accounting and Budget Group, GS-0500**, or the **Financial Management Series, GS-0505**, to evaluate project manager positions for financial systems projects;
- The **Administrative Analysis Grade Evaluation Guide** to evaluate project manager positions for projects where a more closely related standard has not been issued; and
- Part II of the **Equipment Development Grade Evaluation Guide** to evaluate positions for project management engineers.

NOTE: If a project manager position exercises supervision of Federal Government employees at a level that meets the criteria indicated in the **General Schedule Supervisory Guide**, be sure to evaluate the position's supervisory duties. Do not classify a project manager position to a lower

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grade on the basis of personal work accomplishment rather than the proper grade for supervising a staff of the type and level actually involved.

Applying Grading Criteria to IT Project Manager Positions

Criteria for grading project manager positions in the Information Technology Management Series, GS-2210 are in the **JFS for Administrative Work in the Information Technology Group, GS-2200**. The grade level of an IT Project Manager, GS-2210 position will depend on the nature of the project as constrained by the relationship of its scope, resources, and timeline (e.g., its size, risk, sensitivity). Because higher grade level positions are broader in scope or involve projects that are more mission critical, they generally require greater knowledge and experience. Consequently, a position occupied by a project manager assigned to add a major enhancement to an existing IT system for a single agency might be classified at the GS-13 grade level, while a position occupied by a project manager adding major enhancements and coordinating capital planning used in a multi-agency IT system might be classified at the GS-15 grade level.

IT Project Manager functions are clearly described in the Information Technology Management Series, GS-2210 in the **JFS for Administrative Work in the Information Technology Group, GS-2200**. The factor level descriptions (FLDs), especially those in the following three GS-2210 specialties, provide criteria for classifying IT Project Manager positions:

(Policy and Planning) GS-13, 14, and 15   FLDs: 1-7 or 1-8, 4-5 or 4-6, 5-5 or 5-6,
(Systems Analysis)   GS-14   FLDs: 1-8, 4-5 or 4-6, 5-5 or 5-6; and
(Network Services)   GS-14   FLDs: 1-8, 4-5 or 4-6, 5-5 or 5-6.

The example on the following page illustrates how Factor 1 (Knowledge Required by the Position) applies to the duties of a particular IT Project Manager, GS-2210-13 position. The factor level descriptions (FLDs) are excerpted directly from the **JFS for Administrative Work in the Information Technology Group, GS-2200**.

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Example: IT Project Manager, GS-2210	**Excerpts from Level 1-7 FLDs**
Sample Duties	

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1) Works with proponents and sponsors to <u>develop a business case that highlights the costs and benefits of the proposed project</u> for presentation to upper level management and for review and approval of the National Information Investment Board. Directs a team of subject matter experts, technical specialists, and support staff <u>to produce a business plan</u> in conformance with established <u>capital planning</u> procedures and agency guidance.

2200 JFS
FLD 1-7 – Common to All Positions
FLD 1-7
(Policy and Planning)
FLD 1-7
(Systems Analysis)

2200 JFS
FLD 1-7
(Systems Analysis)

2200 JFS
FLD 1-7
(Policy and Planning)

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Common to All Positions – Knowledge of, and skill in applying:
- cost-benefit analysis principles and methods
- project management principles and methods

sufficient to:
- plan and carry out difficult and complex assignments and develop new methods, approaches and procedures
- interpret policies, standards, and guidelines

Policy and Planning – Knowledge of, and skill in applying:
- the organization's policy and planning formulation process
- capital investment planning principles and methods
- the organization's enterprise IT goals and objectives
- IT metrics methods and concepts

sufficient to:
- draft IT policies and plans
- participate in the IT capital planning process
- develop and monitor metrics used in evaluating the accomplishment of IT goals and objectives

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2) <u>Prepares, implements, monitors, and updates the project plan. Coordinates with the system's owner and upper level management</u> to ensure the actions are consistent with the approved plan. <u>Oversees the design, construction, testing, and implementation of the system.</u>

2200 JFS
FLD 1-7
(Policy and Planning)

2200 JFS
FLD 1-7
(Systems Analysis)

2200 JFS
FLD 1-7
(Network Services)

</td>
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Systems Analysis – Knowledge of, and skill in applying:
- systems design tools, methods, and techniques, including automated systems analysis and design tools
- systems design standards, policies, and authorized approaches
- systems design precedents or alternative approaches
- structured analysis principles and methods
- business processes and operations of customer organizations

sufficient to:
- develop requirements and specifications for systems that meet business requirements
- advise on the merits of proposed systems development projects
- apply a structured systems analysis approach to the design and development of new or enhanced applications

Network Services – Knowledge of, and skill in applying:
- network systems design, development, testing, installation, operations, management, and maintenance concepts and methods
- the organization's network architecture, topology, and protocols

sufficient to:
- provide network services that support business requirements
- plan, design, develop, and integrate network systems consistent with existing or planned network infrastructures

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Evaluating an IT Project Manager, GS-2210-15 position could develop as follows across all nine factors:

Factor	Level	Points
1. Knowledge Required	1–9	1,850
2. Supervisory Controls	2–5	650
3. Guidelines	3–5	650
4. Complexity	4–6	450
5. Scope & Effect	5–6	450
6 & 7. Contacts & Purpose	4–D	330
8. Physical Demands	8–1	5
9. Work Environment	9–1	5
Total Points		4,390
Conversion		GS-15

Identifying Positions Above the GS-15 Grade Level

Agencies are responsible for managing their executive resources and deciding how to organize functions and structure positions, including project manager positions, in a manner that best meets the organization's mission requirements. This includes deciding whether positions meet the Senior Executive Service (SES) criteria or the Senior Level (SL) or Scientific/Professional (ST) criteria and establishing individual SES, SL, and ST positions within the agency's executive resource allocation as authorized by OPM.

The law and OPM regulations clearly state that SES, SL, and ST positions must be classifiable **above the GS-15 grade level.** Positions at the GS-15 grade level as described in statute clearly cover a broad range of work: *Grade GS-15 includes those classes of positions the duties of which are to perform, under general administrative direction, with very wide latitude for the exercise of independent judgment, work of outstanding difficulty and responsibility along special technical, supervisory, or administrative lines which has demonstrated leadership and exceptional attainments* (5 U.S.C. 5104(15)). Do not assume a project manager position is above the GS-15 grade level simply because it has a somewhat larger scope or requires more knowledge and skill than another project manager position that is already classified at GS-15.

Distinctions among the SES, SL, and ST positions are not always clear. The following information provides general guidance to help agencies identify SES, SL, and ST positions; maintain an agency's flexibility to manage its executive resources; and contribute to intra- and inter-agency consistency in establishing SES, SL, and ST positions.

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General Information - Unless an agency is excluded from the SES by statute or by the President of the United States, any position that is classifiable above the GS-15 grade level **and** which meets the functional executive criteria set forth in 5 U.S.C. 3132(a)(2) may be placed in the SES. Positions that are classifiable above the GS-15 grade level that do **not** meet the executive criteria and involve the performance of high-level research and development in the physical, biological, medical, or engineering sciences are more appropriately placed in the ST system. The SL system includes any other positions that are classifiable above the GS-15 grade level and do **not** meet the executive criteria and do **not** involve the fundamental research and development responsibilities characteristic of ST positions.

SES Criteria - 5 U.S.C. 3132(a)(2) sets forth the criteria that characterize SES positions. SES positions must be classifiable **above the GS-15 grade level**, or equivalent, based on the duties, responsibilities, and qualifications required by the position. In addition, the incumbent **must** engage in one of the following activities:

- Direct the work of an organizational unit;
- Be accountable for the success of one or more specific programs or projects;
- Monitor progress toward organizational goals and periodically evaluate and make appropriate adjustments to such goals;
- Supervise the work of employees (other than personal assistants); or
- Otherwise exercise important policy-making, policy-determining, or other executive functions.

Directing the work of an organizational unit to manage a project includes responsibility for:
- Assessing policy, program, and project feasibility;
- Determining program goals and developing implementation tools;
- Designing an organizational structure to promote effective work accomplishment; and
- Setting effectiveness, efficiency, productivity, and management/internal control standards.

Being accountable for the success of a program or project encompasses responsibility for the full range of factors that affect program/project accomplishment. This includes:

- Obtaining the resources necessary to achieve the desired project objective;
- Assuming responsibility for the effective use of government resources; and
- Dealing with key officials both within and outside the organization to gain understanding and support for the project.

Monitoring progress toward organizational goals and making appropriate adjustments is an extension of an individual's responsibility for directing the work of an organizational unit. It includes:

- Monitoring work status through formal and informal means to evaluate progress toward objectives;
- Assessing overall effectiveness, efficiency, and productivity of the organization;
- Identifying, diagnosing and consulting on problem areas related to implementation and goal achievement; and
- Making decisions regarding alternative courses of action.

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